

SUPER BOWL

Research Note

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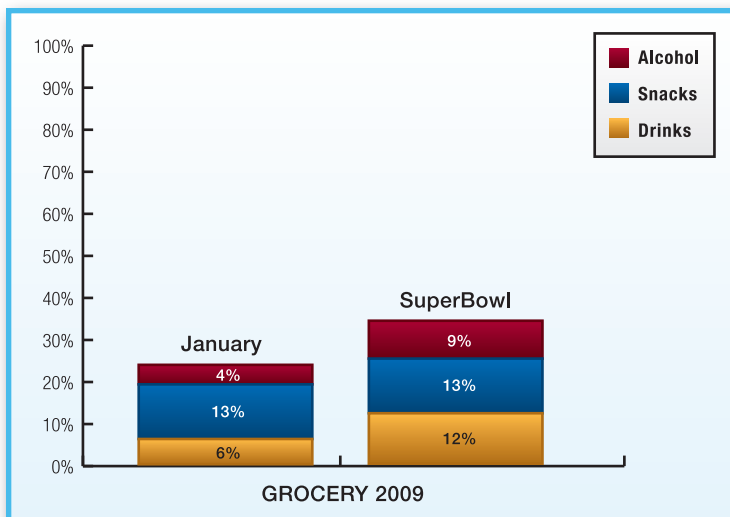
Market Track

Super Bowl Advertising Trends Analysis: *Do You Know What's Making the Front Page Circulars?*

When making your Super Bowl advertising decisions for 2011, it's easy to see why understanding trends from years prior may be helpful in planning a winning strategy. The Super Bowl is the highest-rated show on television and has become the number one in-home party event of the year, with close to 100 million viewers expected in 2010. Retailers will also see over \$9 billion in related spending, including \$600 million in snacks; and Super Bowl is the eighth biggest event for beer sales. Furthermore, Super Bowl Sunday is expected to surpass Cinco de Mayo this year as the number one event for avocado consumption.

Here's a glimpse into what happened in 2009 in terms of Super Bowl advertising. Will we see the same categories promoted in 2010 or are we in for some surprises? Look for our Super Bowl summary next week for the answers.

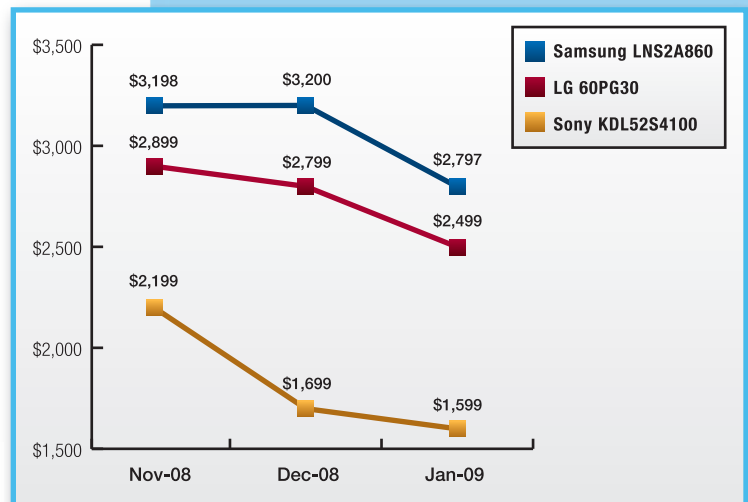
- **Alcohol & Snacks:** Ad share within grocery circulars for alcohol and snacks doubled, going from a weekly average of 4% and 6% respectively pre-Super Bowl to 9% and 12% respectively the week of Super Bowl.
- **Wine:** 2009 saw 22% fewer wine ads during Super Bowl week than the preceding weeks.



Comparison of Ad Share for Snacks, Drinks and Alcohol – January and Super Bowl 2009

Will Flat Screen Advertising Show a Bump Pre-Super Bowl?

If 2009 was any indication, front page advertising for large HDTV flat screens this January will double the total seen during the most recently completed holiday season. In 2009, pricing for the same TV went down by up to 8% in the week leading up to the Super Bowl as compared to the holidays. Will the same hold true for 2010? Check in next week as Market Track recaps Super Bowl promotion activity for 2010.



Comparison of select HDTV promotional prices November 2008 through January 2009

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- **Spirits & Beer:** When compared to advertising during the three weeks prior to last year's Super Bowl, Super Bowl promotions included five times the number of spirits ads and double the number of beer ads. However, the overall number of ads for spirits went down by half in 2009, compared to 2007; and beer ads were down 18% during that same period comparison.
- **Non-Alcoholic Beverages:** Mass merchandisers had made only minor changes from 2008, while drug stores had supplemented snacks for carbonated soft drinks and other non-alcoholic beverages. Share of advertising in drug stores for snacks dropped nearly half going from 66% of ad share in the pre-Super Bowl period in 2008 compared to 36% in 2009. Mass retailers reduced snack advertising by 8% from 2008 to 2009.
- **Frozen Pizza:** 81% of retailers promoted frozen pizza in their circulars in 2009, up 10% from 2007. The average price of frozen pizza has steadily increased, up 28% from 2007 to 2009.



- **Avocados:** Of the hundreds of grocery circulars tracked during the week of Super Bowl, 35% included promotions for avocados; 25% for tortilla chips; while only 11% packaged the duo together. Furthermore, there was only a single instance of a circular displaying guacamole, avocado and tortilla chips in the same ad block.

This Market Track Research Note provides just a snap-shot into what happened during last year's Super Bowl promotions — a key time period for advertisers. Stay tuned for Market Track's report on 2010 advertising coming out next week to see whether trends will be similar or if new categories emerge as the advertising leaders.